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## Sweden

### Retail Food Sector

### Report for Sweden and Finland

2002

Approved by:

**Lana Bennett**

**U.S. Embassy, Stockholm**

Prepared by:

Bettina Dahlbacka

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#### **Report Highlights:**

**The restructuring of the Nordic retail food sector continues as pan-Nordic mergers and cooperative agreements seek to achieve greater efficiencies and economies of scale to fend off other European competitors. This offers new interesting opportunities in terms of large volumes and diversity of products being demanded. There is a great demand for organic and convenience food and food and beverages which appeal to the health conscious.**

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## **SECTION I. MARKET SUMMARY**

### **SWEDEN AND FINLAND**

Economic growth in both Sweden and Finland has strengthened domestic demand for high-value consumer-ready products. However, the recent slowdown in both world and local economies inserts some caution concerning future consumer spending habits. Thusfar, however, retail food sales have remained high and further growth is expected.

The food retail sector in these markets are largely integrated and concentrated. In both Sweden and Finland, the three largest import/wholesale groups in each country cover over 70% of their markets.

The restructuring of the Nordic retail food sector continues as pan-Nordic mergers and cooperative agreements seek to achieve greater efficiencies and economies of scale to fend off other European competitors. The Swedish and Finnish retail chains are meeting the intensifying competition by increasing efficiency by centralizing purchases, international alliances and expanding their operations in the Nordic and Baltic countries. In such concentrated markets where retailers have such large market shares, growth in the home market becomes virtually impossible. Going abroad, therefore, becomes the only possible road to growth and the Swedish and Finnish retailers are being pressured into finding new and larger forms of cooperation and mergers at an international level.

The fastest growing "concept" in the food retail trade in Sweden and Finland is discount stores. Although discount stores currently account for only 15 and 10 percent in Sweden and Finland respectively, volumes have tripled over the last ten years. Growth figures are showing no signs of leveling off, and this, of course, has stirred interest among foreign players to enter the domestically dominated Nordic food retail market. Thus, in August 2002, the German hard discounter Lidl entered the Finnish market.

The trend throughout Europe of fewer but larger players continues. In 2001, 75% of Swedish retail food sales of approximately USD 18 billion went through large supermarkets and hypermarkets. In Finland, the 375 largest stores accounted for half of total retail food sales of USD 9.4 billion in 2001. There were 6,157 food retail outlets in Sweden in 2001 compared to 13,000 in 1970. In Finland, there were 4,165 outlets in 2001, which was 160 fewer than the previous year.

Swedish and Finnish consumers are gravitating towards fresher, more convenient and more nutritional foods. High demands are being made on food quality, origin and environmental concerns. The ongoing socio-demographic changes with busier life styles and increasing single-person households are affecting food retailing to a high degree. Retailers are shifting their product ranges towards an increasing share of ready-to-eat foods and home meal replacements. Eating out is growing faster than traditional retail sales. Both in Sweden and Finland, about 20 percent of meals are currently eaten out of the home. Fast food is the segment benefitting most from these trends, and it is now a rapidly growing part of the traditional restaurant sector. American-style fast food chains, sushi bars and coffee shops are extremely popular in these markets.

Organic and functional foods are gaining popularity in these markets (particularly in Sweden) with significant consumer awareness in the area of food safety and healthy eating habits. Consumers are willing and able to pay higher prices for food and drink products that fall into these categories. Also, through increased traveling and willingness to move away from their culinary traditions, Swedish and Finnish consumers are more open to ethnic foods.

Despite the facts that the Nordic countries maintain a leading position when it comes to computers per capita, and that many consumers are attracted by the thought of doing their food purchases from a computer, internet sales of retail food products have been limited. The positive outlook that the major retailers had a few years ago regarding this sales vehicle has changed, and the list of retailers terminating their websites is long. Currently, there are only a few profitable internet operators in food distribution in Sweden and Finland.

### **Advantages and Challenges Facing U.S. Products in Sweden and Finland**

<b>Advantages</b>	<b>Challenges</b>
Sophisticated markets. High acceptance of new products and concepts. U.S. products are considered high quality and trendy.	U.S. products at a price disadvantage compared to competitors based in the European Union.
Growing consumer demand for value-added products, convenience foods, international/ethnic cuisine, "functional" and organic foods.	High distribution and shipping costs.
Location gives access to a Nordic/Baltic market comprising 25 million consumers spending about USD 45 billion annually on food, beverages and meals out.	Strong hesitation with respect to genetically modified products and no access for hormone-treated beef from the U.S.
High standard of living, well-educated workforce, growing incomes. English is widely spoken.	Strong dollar in 2001 was negatively affecting U.S. sales.

## **SECTION II. ROAD MAP FOR MARKET ENTRY**

### **A. Supermarkets, hyper-markets or super centers, club and warehouse outlets**

As stated above, these markets are dominated by a few import/wholesale/retail groups, and therefore, U.S. exporters have a relatively easy job of locating potential buyers. However, for the same reason, it may be difficult to get in the door. Depending on the product and the quantities, there are different ways for the American exporter to penetrate these markets:

- retailers/wholesale groups (large quantities)
- specialized importers/distributors (niche and select brand name and private label products)
- agents (products with strong brand names)

**Market entry strategies for U.S. food products should include :**

- 1) Market research in order to assess product opportunities.
- 2) Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.
- 3) Locating an experienced distributor or independent reliable agent with strategic distribution channels to advise on import duties, sanitary regulations, and labeling requirements. It is advisable to initiate personal contact in order to discuss marketing matters such as funding for advertising, slotting allowance, in-store promotions and tasting events. Suppliers may also want to consider trade fair participation to raise awareness of their products.
- 4) Exploration of the purchasing arrangements of the larger retail chains.
- 5) Consider using USDA's Supplier Credit Guarantee program to made credit terms more attractive to importers.

**Market Structure**

The Swedish and Finnish retail food industry has long been characterized by stable structures and a low degree of internationalization. However, this picture began to change in 1999 when the Netherlands's retail food giant Ahold took over a 50% interest in Sweden's leading retailer ICA. Subsequently, there has been a wave of consolidations among the Nordic retailers and the companies are becoming more Nordic than domestic in their perspective.

Looming international competition has increased the role of volume dynamics in the food retail sector in the Nordic market. All the major players are seeking to minimize their costs by coordinating central purchasing and taking advantage of the economies of scale. Also, the Nordic retailers are aggressively promoting the development of private label product lines.

The general trend remains unchanged in Sweden and Finland, with hypermarkets and large supermarkets increasing sales volumes, while small and medium-sized stores lag behind. The number of retail outlets continues to decrease, although at a somewhat slower pace.

The discount stores continue to gain market shares in Sweden. In 2001, there were 350 discount stores in Sweden which accounted for 15% of total sales, compared to 3% in 1990. Discount stores have not been developed as extensively in Finland as in Sweden. However, this scenario may change with the market entry of German hard discounter, Lidl, into Finland in August 2002.

Lidl's ambitious plans to enter the Swedish market at the same time have been stalled by bureaucratic

red-tape. A logistics center in the South of Sweden is yet the only sign of any progress. However, a recent food price survey showed that Swedish food prices are about 20% higher than the EU average, and this has become a major concern of the Swedish Government. Critics have blamed the high prices on the lack of competition in the industry. Laws will now be reviewed in order to make it easier for foreign and domestic competitors to establish operations in Sweden.

The Nordic retailers have been gearing up for Lidl's entry in the market. Axfood, the main player in the discount sector in Sweden, has started up "Willys Hemma" stores, a Swedish version of Lidl's outlets. Sweden's major retailer, ICA Ahold, and leading Danish retailer, Dansk Supermarked, combined forces in a 50/50 joint venture. The new company will operate Netto discount stores in Sweden and Norway. So far, fifteen Netto stores have been opened in the South of Sweden. Reportedly, the company plans to expand in Sweden during 2003.

### **Company Profiles - SWEDEN**

The Swedish wholesale and retail food market is dominated by three groups, ICA, Axfood and Coop, accounting for over 70 percent of the commodity retail market. Each group has developed a tight integration of purchasing, importing, wholesaling, distribution and retailing. Imports of foods are either handled by the chains themselves or through specialized importers and agents. ICA and Coop are also engaged in joint Nordic buying groups.

Nordic expansion has been high on the agenda for all three Swedish food retailers. The formation of Coop Norden during the year was the Swedish cooperative movement's first step toward working on a pan-Nordic basis. ICA, in turn extended its Nordic cooperation by entering into a joint venture with Dansk Supermarked and Axfood strengthened its ownership in Spar Finland in 2001.

**ICA Ahold** is the Nordic region's largest grocery retail group. Although most of its stores are located in Sweden and Norway, the chain is now expanding its interests into Denmark and the Baltic countries. In 1999, the Netherlands' retail food giant Ahold acquired a 50-percent stake in ICA. A merger between ICA and the Norwegian Hakon Group had been implemented earlier in 1999. In 2001, a joint venture between ICA Ahold and the leading Danish retailer Dansk Supermarked was formed. The 50-50 venture operates discount stores and hyper-markets in Sweden and Norway. ICA Ahold is present in all three Baltic states with about 70 supermarkets and intends to grow in the Baltics through more and varied supermarket formats. ICA Ahold has also entered into a buying agreement with Finland's largest retailer Kesko. ICA Ahold operates about 1,850 outlets in Sweden (ICA Nara, ICA Supermarket, ICA Kvantum, ICA Maxi, Rimi), and the operations center is located in Vasteras. ICA stores accounted for 35.8% of Sweden's retail food sales in 2001.

**COOP Norden** is the result of a merger of three Scandinavian cooperatives; Coop Sweden, Danish FDB and Coop Norway. Coop Norden is estimated to have a turnover of USD 8 billion, a 30% market share of the Nordic market and 26,000 employees. Coop Norden established its headquarter in Gothenburg, Sweden and started operations there on January 1, 2002. The increase in competition from large international chains and the pace of changes in the industry prompted this merger of

cooperatives. Through the merger, the three cooperatives believe they can face these challenges by benefiting from larger buying volumes, efficiencies in distribution, a common business development strategy and lower costs for information technology. Coop Norden owns the biggest share of NAF International, a buying company located in Denmark, which represents retail cooperatives in the Nordic countries and other European countries. In Sweden, Coop operates about 430 Forum hypermarkets and Coop Konsum stores. In 2001, Coop Sweden accounted for 18.2% of Sweden's retail food sales.

**Axfood AB** was formed in November 1999 through the merger of Hemkop and D&D Dagligvaror and the subsequent acquisitions of Spar Sverige, SparInn Snabbgross and a 40% of the share capital in Spar Finland. The new organization became one of the largest food retail operations in the Nordic countries. Until recently, Axfood has been a member of the Nordic buying group United Nordic, which also handles overseas buying for Dagrofa (Denmark), Norgesgruppen (Norway) and Tuko Spar (Finland). Axfood has 923 stores in Sweden (Hemkop, Willys, Willys Hemma, Spar, Tempo, Vivo) and 304 stores in Finland (Spar, EuroSpar). In 2001, Axfood had a market share of about 20 percent and 9 percent in these countries, respectively.

Until recently, all three groups have been engaged in joint Nordic buying groups. However, Axfood has reportedly terminated its cooperation with its Nordic partners in the Nordic purchasing alliance. Axfood's decision to leave the purchasing pact is seen as increasing pressure on players in the Nordic food market to move towards mergers in order to strengthen their competitiveness.

**SWEDEN - MAJOR RETAIL PROFILE**

<b>Retailer/Type of Outlet</b>	<b>Ownership</b>	<b>Sales CY02 (\$ Million)</b>	<b>No. of Outlets</b>	<b>Location</b>	<b>Market Share</b>	<b>Purchasing/ Agent Type</b>
ICA Ahold -food retail -discount stores -gas marts/convenience -supermarkets -hyper-markets	Swedish/ Norwegian/ Dutch	6,506	1,905	Sweden Norway Denmark Estonia Latvia Lithuania	35.8	Direct/ importer/ wholesaler
Axfood -food retail -convenience -discount stores -supermarkets -gas marts/convenience	Swedish/ Finnish	3,421	923	Sweden Finland Norway Denmark	18.8	Direct/ importer/ wholesaler
Coop -food retail -gas marts/convenience -supermarkets -hyper-markets -department stores	Swedish Norwegian Danish	3,315	951	Sweden Norway Denmark	18.2	Direct/ importer/ wholesaler
Bergendahls -food retail -discount stores -supermarkets	Swedish	321	28	Southern Sweden	1.8	Direct/ importer/ wholesaler

**Company Profiles - FINLAND**

A few central wholesale organizations (K-Group, S-Group, Tradeka/Elanto, Spar Group, Wihuri and Stockmann) together dominate the food industry with an aggregate market share of nearly 95%. These chains have closely knit wholesale and retail arrangements comprising a compact and efficient goods delivery system and a nationwide network of retail shops as well as department stores and supermarkets. They also have hotel and restaurant chains and catering services. The centralized system makes distribution economical, and purchases from abroad can be made in feasible quantities considering the relatively small size of the market. Almost one-third of the total wholesale trade in Finland goes through these wholesale organizations.

**KESKO** is the leading trading company in Finland. It consists of the parent company Kesko Ltd. and its four subsidiaries of which Kesko Food Ltd. is the largest. The key businesses of Kesko Food Ltd.

are the chain operations of the K-Food stores, catering sales to HRI customers and wholesaling and retailing in the Baltic countries. The K-food stores are privately owned and buy most of their products from the Kesko wholesale organization. Centralized purchasing gives competitive advantages by creating volume and synergy benefits. Also, Kesko works in cooperation with major European food chains in AMS (Associated Marketing Service). The total sales of the Kesko-affiliated retailers accounted for 36.5% of retail food sales in Finland in 2001. The K-Group operates about 1,130 outlets (Citymarkets, K-Supermarkets, K-markets, K-Extra, K-Pikkolo, Rimi chains). Kesko continues to aggressively expand its operations in the Baltic countries. It has identified the Baltic region as a driver for future growth and is aiming at a 25% market share.

### **S-GROUP**

The S-Group and Tradeka/Elanto Group represent the cooperative movement in Finland. The S-Group consists of the cooperative societies and Suomen Osuuskauppojen Keskuskunta (SOK) with their subsidiaries. The Group operates Citysokos department stores, S-Market supermarkets, Prisma hypermarkets, Sale and Alepa grocery stores, hotels and restaurants, service stations, hardware and agricultural stores as well as several specialty stores. The S-Group's grocery store chains, Prisma, S-market and Sale/Alepa have, during recent years, been extremely successful. This success can be measured by a market share increase from 15.9% in 1990 to 30.5% in 2001. Through its subsidiaries and associated companies, the S-Group also conducts food trade in the Baltic countries.

**LIDL**, the German hard discounter, entered the Finnish market by simultaneously opening up its first ten outlets around the country in August 2002. Further expansion is planned throughout Finland. Lidl's logistics center is located in Janakkala, Southern Finland, and has an area of 30,000 sqm. According to a market survey, Lidl's products are priced at about 10-15% below the average Finnish food prices and about 80% are private label products. The effects of Lidl's entry into the Finnish food market remain to be seen. Large European chains such as Lidl have a great deal of experience in developing their operations abroad, and they will undoubtedly increase competition in the Finnish retailing sector.

**INEX PARTNERS OY** is a joint venture owned on a fifty-fifty basis by the S-Group and Tradeka/Elanto. Inex Partners OY specializes in the sourcing of groceries and the provision of logistic services for the retail chains operated by the S-Group, Tradeka and Elanto.

**FINLAND - MAJOR RETAIL PROFILE**

<b>Retailer/Type of Outlet</b>	<b>Ownership</b>	<b>Sales CY02 (\$ Million)</b>	<b>No. of Outlets</b>	<b>Location</b>	<b>Market Share</b>	<b>Purchasing / Agent Type</b>
Kesko (K-Group) - hyper-markets - department stores - supermarkets - self-service - small shops	Finnish	3,439	<b>1,130</b>	Finland Sweden (hardware) Estonia Latvia Lithuania	36.5	Direct/ importer/ wholesaler
S-Group - hyper-markets - department stores - supermarkets - self-service - small shops	Finnish	2,873	<b>633</b>	Finland Estonia Latvia Lithuania	30.5	Importer/ wholesaler (Inex)
Tradeka/Elanto - hyper-markets - department stores - supermarkets - self-service - small shops	Finnish	1,188	<b>584</b>	Finland Estonia Latvia Lithuania	12.6	Importer/ wholesaler (Inex)
Spar Group - department stores - supermarkets - self-service - small shops	Swedish Finnish	814	<b>304</b>	Finland Sweden	8.7	Importer/ wholesaler (Tuko Logistics)

## **B. Convenience Stores, Gas Marts, Kiosks**

### **Entry Strategy**

The convenience sector offers more limited opportunities for the U.S. exporter, but certain products could sell well via such outlets. Most of the convenience stores belong to established retail chains, and the same large wholesalers/retailers are suppliers to the convenience sector. Gas marts are either affiliated with gasoline companies or with the large retail food distribution groups. New-to-market exporters should target this sector in the same way as described under the entry strategy section for supermarkets.

### **Market Structure**

As in the retail food sector, there has been a wave of consolidations and mergers among the Nordic players over the last years. In Sweden, the six largest players in the convenience sector, ICA, Coop OKQ8, Shell, Reitan Narvesen, Axfood and Preem accounted for USD 1.7 billion SEK or 52% of total sales of grocery products in the convenience sector.

**Gas marts** continue to gain market shares in Sweden and Finland. Fast food is the concept that is expanding the most in gas marts. In 2001, total sales of grocery products in gas marts in Sweden amounted to USD 1.2 billion, or 6% of total retail food sales. In Finland, sales reached USD 377 million in 2001.

**Convenience stores** have been in a continued decline for the last couple of years, mostly due to tough competition from gas marts. However, the extension of opening hours for stores of under 400 sqm in Finland in 2001, has been somewhat of a renaissance for small convenience stores. Several of the large Finnish retail chains have started operations with a network of small shops. These stores are especially popular in larger cities, where time-pressured lifestyles predominate.

**Kiosks** offer limited items such as snacks, sweets, cigarettes and magazines. The Rautakirja R-Kiosk is the leading kiosk chain in Finland, where kiosks still have 3.5% of total grocery sales. The chain comprises a total of 720 R-kiosks in Finland and 200 in Estonia. Rautakirja's involvement in Latvia derives from its 50% holding in Narvesen Baltija SIA. Narvesen Baltija is jointly owned by the Norwegian Reitan Narvesen and operates around 500 kiosks in Latvia.

**Company Profiles - SWEDEN****MAJOR GAS MARTS AND CONVENIENCE STORES**

<b>Retailer Name/ Outlet Type</b>	<b>Ownership</b>	<b>2001 Grocery Sales (US\$ million)</b>	<b>No. of Outlets</b>	<b>Location</b>	<b>Purchasing Agent Type</b>
Statoil, gas mart	Statoil/ICA AB (Norwegian/ Swedish)	465	521	Sweden Norway Denmark	Wholesaler/ importer (ICA)
OK/Q8, gas mart	Swedish/Kuwait Petroleum	261	613	Nationwide	Wholesaler/ importer (Axfood)
Select, gas mart	Swedish Shell (Dutch/ Swedish)	97	300	Nationwide	Wholesaler/ importer (Axfood)
Preem, gas mart	Saudi/Swedish	82	312	Nationwide	Wholesaler/ importer (Axfood)
Pressbyran, convenience	Reitan /Narvesen (Norwegian)	160	324	Nationwide	Wholesaler/ importer (ICA)
Handlarn, convenience	Axfood (Swedish)	97	180	Nationwide	Wholesaler/ importer (Axfood)
7-Eleven, convenience	Reitan /Narvesen (Norwegian)	50	60	Nationwide	Wholesaler/ importer (ICA)
NaraDej, convenience	ICA (Swedish)	20	60	Nationwide	Wholesaler/ importer (ICA)

**Company Profiles - FINLAND****MAJOR GAS MARTS AND THEIR MARKET SHARES**

In Finland, the three largest gas marts (Neste, Esso and Shell) accounted for almost 80% of total gas mart sales of grocery products in 2002. These companies operate their shops under the names of Quick Shop for Neste, Snack & Shop for Esso and Select for Shell.

<b>Gas Marts Finland</b>	<b>No. of Outlets in 2002</b>	<b>Grocery Sales (US\$ Million) 2002</b>	<b>Market Share %</b>
Neste	410	108	30.2
Shell	299	90	24.5
Esso	231	86	23.8
Teboil	206	36	10.5
Seo	70	8	2.4
Station 1	50	7	2.0
Supa	18	1	0.4
ABC	15	7	2.2

**C. Traditional Markets - Small Independent Grocery Stores**

The small "gourmet food" grocery stores offer limited possibilities for U.S. exporters. The stores are usually located in larger cities and sometimes carry a wide range of imported products, but they tend to buy in very small quantities.

## SECTION III. COMPETITION

European Union (EU) member states provide the main competition to U.S. consumer-oriented food imports. EU-origin products have a natural advantage in many product categories simply because they enter Sweden and Finland duty free, while American exporters have to face the EU's external duty/tariff structure as well as non-tariff barriers to trade (e.g. the hormone in beef ban, sanitary restrictions on poultry and GMO policies).

### **A. Sweden's Imports of Consumer-Oriented Agricultural Products in 2001**

<b>Country</b>	<b>Import 2001 (\$1,000)</b>	<b>Market Share</b>
Sweden		
Denmark	597,536	20%
Netherlands	533,425	17%
Germany	331,001	11%
France	192,152	6%
Italy	190,881	6%
Spain	179,905	6%
United Kingdom	123,190	4%
Belgium	114,798	4%
Finland	112,677	4%
Ireland	103,777	3%
<b>United States</b>	<b>81,781</b>	<b>3%</b>
Norway	61,020	2%
Costa Rica	36,341	1%
Austria	29,593	0.97%
Poland	27,417	0.90%
Other	346,441	11%
World	3,062,007	100%

Note: Imports from the U.S. are understated due to transit trade via other EU countries such as the Netherlands and Germany.

**B. Finland's Imports of Consumer-Oriented Agricultural Products in 2001**

<b>Country Finland</b>	<b>Import 2001 (\$1,000)</b>	<b>Market Share</b>
Sweden	192,357	15%
Netherlands	147,750	11%
France	125,752	10%
Germany	117,501	9%
Spain	114,563	9%
Denmark	114,060	9%
Belgium	59,822	5%
Italy	57,809	4%
United Kingdom	43,260	3%
Ireland	29,612	2%
Costa Rica	27,891	2%
<b>United States</b>	<b>26,818</b>	<b>2%</b>
Brazil	24,829	2%
Israel	16,565	1%
Panama	13,123	1%
Other	197,472	15%
World	1,309,258	100%

Note: Imports from the U.S. are understated due to transit trade via other EU countries such as the Netherlands and Germany.

**SECTION IV. BEST PRODUCT PROSPECTS****A. Products Present in the Markets Which Have Good Sales Potential**

- Wines
- Tree Nuts
- Dried Fruits
- Snack Foods

- Fruit Juices
- Processed fruits & vegetables
- Sauces/Seasonings
- Pancake/cake mixes
- Rice (most U.S. rice currently packaged in other European countries)
- Candies

**B. Products Not Present in Significant Quantities but Which Have Good Sales Potential**

- Fresh Fruits and Vegetables
- Organic Food
- Ethnic Food
- Seafood Products
- Niche market; Specialty Food Products
- Frozen Food
- Rice mixes
- Vegetarian Food
- Ready-made convenience meals
- Pet food

**C. Products Not Present Because they Face Significant Barriers**

- Meat (hormone ban)
- Poultry (sanitary restrictions)

**SECTION V. POST CONTACT AND FURTHER INFORMATION**

Foreign Agricultural Service  
American Embassy  
Dag Hammarskjolds Vag 31  
S-115 89 STOCKHOLM, Sweden  
Tel: (46-8) 783 5390  
Fax: (46-8) 662 8495  
Email: agstockholm@fas.usda.gov

For further information on exporting U.S. agricultural products to Sweden, please visit the FAS/Stockholm home page at: <http://www.usemb.se/Agriculture>.

Average exchange rate Sept 00 - Sept 01 in Sweden: US\$ 1 = SEK 10.33

Average exchange rate Sept 00 - Sept 01 in Finland: US\$ 1 = FIM 6.64

Current exchange rate December 16, 2002 in Sweden: US\$ 1 = SEK 8.898

Current exchange rate December 16, 2002 in Finland: US\$ 1 = EUR 0.979